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AUTHOR Johnson, Diane E.
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ABSTRACT

This training package, one in a series of instructional modules consisting of an instructor's guide and a student activity packet, deals with managing the office employee. Included in the instructor's guide are general directions for implementing the presentation; a detailed guide for teaching the lesson that includes performance objectives, suggestions for discussion, optional student activities, suggested evaluation criteria, keys to the activities, and a narrative script for use with a separate slide/tape presentation (audiovisual material not included here); and a list of references. The student activity packet includes an introduction; performance objectives; directions for using the packet; a student checksheet; and resource and activity sheets covering job descriptions, help wanted advertisements, and evaluation documentation. (MN)

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OFFICE OCCUPATIONS

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MANAGING THE OFFICE EMPLOYEE

INSTRUCTOR'S GUIDE
STUDENT ACTIVITY PACKET

Prepared by Diane E. Johnson

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Occupational Curriculum Laboratory
East Texas State University
Commerce, TX 75428

(214) 886-5623

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MANAGING THE OFFICE EMPLOYEE

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INTRODUCTION

This module, made up of a slide/tape presentation and accompanying printed materials, was developed as a result of a proposal funded by the Texas Education Agency to the Occupational Curriculum Laboratory at East Texas State University. Based on the results of a needs assessment of selected postsecondary office occupations instructors from across the state of Texas, this and several other modules were developed to provide instructional materials in competency areas that require formal classroom training. Selected postsecondary office occupations instructors assisted in the development, field review, and evaluation of the final product. To further insure the usability of these products, they were evaluated by members of a business advisory committee and tested by postsecondary office occupations students.

All of the materials in these modules have been developed with student needs and interests in mind and are designed with the flexibility for use as supplementary or primary teaching aids in many of the office occupations classes. The overall reading level of the printed material in this particular package is 12.29 as calculated according to the FOG Index. In general, this reading level score is consistent with that which can be expected of postsecondary students. The added audio and visual stimuli help insure understanding by those students whose reading levels do not meet these expectations.

Included in each slide/tape package are a set of full-color slides, a script, a cassette tape, an instructor's guide, and a student activity packet. Each instructor's guide includes general instructions for use by an individual or in a group setting, the narrative for the slide/tape presentation, and specific instructions on how to use the materials in a particular package. The specific instructions section contains the performance objectives, suggestions for class discussion, special notes to the instructor, optional student activities, solutions for the activities completed by the students, and suggestions for evaluation of the work produced.

The student activity packet consists of a section on information the student must know in order to complete the activities, the performance objectives to be attained, any necessary resource materials, and the activities to be completed in order to master the competencies on which the module is based.

ACKNOWLEDGMENTS

We extend special thanks to the following committee members and their employers for their cooperation in reviewing, evaluating, and testing the materials developed through this project:

Business Advisory Committee

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Nancy Hunsucker, Administrative Manager, Kelly Services

Teri Riza, Clerk Typist, East Texas State University

Technical Advisory Committee

Patsy Blankenship, North Lake College

Dr. Jack E. Johnson, East Texas State University

Teacher Advisory Committee

Virginia L. McKenzie, Tarrant County Junior College, South Campus

Pat S. Sugarek, Bee County College

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INSTRUCTOR'S GUIDE

MANAGING THE OFFICE EMPLOYEE

INSTRUCTOR'S GUIDE

GENERAL INSTRUCTIONS

Equipment Needed

Before using this presentation, make sure that arrangements have been made to have the following equipment available: a slide projector, a projection screen, and a cassette recorder/player.

Make sure that all equipment is working properly.

Preparations Before Class

1. Preview the slide/tape presentation and determine how it will be used in your class.
2. Plan short but relevant introductions to tell students what to look for in the slide/tape presentation.
3. Allow enough time to show the presentation in its entirety.
4. If you use handouts, be sure they are distributed <u>after</u> the presentation.

Procedures for Group Setting

1. Choose a point in the lesson where the slide/tape presentation will have the greatest impact.
2. After showing the slide/tape presentation, ask students to give highlights in their own words.
3. If necessary, show the presentation or parts of it again to emphasize points important to successful completion of the activities.
4. If necessary, make arrangements for students to use the slide/tape presentation on an individual basis.

Procedures for Individual Setting

1. Make sure space and equipment are available.
2. Check equipment to make sure it is working properly.
3. Demonstrate procedures for using the equipment.

4. Have students view the slide/tape presentation as many times as necessary to understand the information given.

Instructions for Using Slides and Cassette Tapes

1. Pick up each slide by its frame so that you do not touch the film.

2. Arrange the slides in the slide tray in sequential order with the slide number in the upper right corner facing you.

3. Insert the cassette tape into the recorder/player.

4. Rewind the cassette tape to be sure it will start at the beginning.

5. Turn on the slide projector. The first slide should be projected on the screen.

6. Start the cassette player.

7. Depress the advance button at the sound of the "beep" if you are using the audible advance.

(NOTE: Review the above procedures with those students who will be using the package individually.)

Student Checksheets

Student checksheets provide a convenient means for the student to take notes while viewing the slide/tape presentation. The points identified on the student checksheets are those the student will have to be familiar with in order to complete the activities provided.

Resource Sheets

Resource sheets contain information essential to the activities and serve as reinforcement for the competency requirements covered by the slide/tape presentation. Students should use the resource sheets as instructed in each student activity packet.

Activity Sheets

Activity sheets are working papers for students. Students are instructed to use them when completing certain activities.

MANAGING THE OFFICE EMPLOYEE

INSTRUCTOR'S GUIDE

SPECIFIC INSTRUCTIONS

Introduction

Managing the Office Employee is an audiovisual aid developed to introduce students to the personnel responsibilities of the administrative manager. This slide/tape package is designed to address only those responsibilities associated with personnel and guides the student through a seven-phase cycle from job analysis to employee termination.

This slide/tape package consists of 77 full-color slides, a cassette tape, an instructor's guide, a script, and a student activity packet that could be used as primary or supplementary tools in a variety of courses, including office procedures and administrative management. Any of these printed materials, which are not copyrighted, can and should be reproduced in order to provide an adequate supply of the materials for completing the activities; there are no separately printed student materials.

Performance Objectives

If a student satisfactorily completes this instructional package, the following competencies can be expected:

1. The student will be able to list and describe the seven personnel functions of the office manager.
2. The student will be able to compose a vacancy announcement.
3. The student will be able to identify questions to be asked during a job interview.
4. The student will be able to identify ways to "manage by example."
5. The student will be able to develop an evaluation documentation form.
6. The student will be able to identify four actions that should occur during a termination conference.

Special Notes to the Instructor

This instructional package may be used in its entirety in a group setting, or as a component of an individualized instruction curriculum. The instructor who desires to adapt this particular package to the specific needs of the program or of the student may find the following suggestions helpful.

1. The intent of this audiovisual instructional package is informational rather than skill building.

2. The four activities provided with this package follow the seven-stage personnel management cycle; each relies on those previously completed. Therefore, the activities should be completed in their numbered order.

3. If any of the provided activities cannot be used in your setting or if students require additional activities to achieve the performance objectives, refer to the section entitled Optional Student Activities. Neither resource sheets nor activity sheets are provided for these activities.

4. The instructor who wishes to present this unit in smaller segments will find logical stopping points immediately following each of these slides: 9 (job analysis); 14 (job description); 20 (vacancy announcement); 34 (employee selection); 38 (employee orientation); 61 (employee supervision); 77 (employee termination).

5. The nature of the activities is such that responses will vary by student; therefore, no keys are provided. The instructor is advised to use resource sheets A, B, and C as models for evaluating activities 1, 2, and 3.

6. Testing instruments are not included in this package. The following are provided as possible suggestions for testing mastery of the competencies addressed:

   a. Use teacher-made tests specifically designed to test the competencies.

   b. Provide students with current job descriptions for clerical/secretarial employees on campus. Have the students develop an attractive, concise vacancy announcement from one of the job descriptions.

Time and Facilities

Approximately one 45- or 50-minute class period should be set aside for introduction and presentation of the slide/tape, which can be shown in any room that can be darkened or that has individual carrels equipped with slide carousels and cassette tape players. In addition, students should be able to complete the four activities in three to four hours. These time estimates are provided as guidelines only. The actual time spent in completing this package will vary with the amount and types of discussion activities that take place and with the abilities of the students. The estimated time needed to complete the provided activities is based on field test results of postsecondary students.

Suggestions for Discussion (for use in a group setting)

1. Before this slide/tape is presented, discuss with the students the performance objectives that must be met.

2. If possible, invite a personnel manager or an office manager who has responsibility for hiring personnel to speak to the class on those personnel-related job duties. Ask the speaker to discuss:
   a. Questions that should or should not be asked during an interview.
   b. Things to look for in evaluation of job applicants.
   c. Things to look for in evaluation of employee performance.
   d. Employee termination procedures:
      (1) guidelines
      (2) exit interviews
      (3) references for involuntarily terminated employees

3. If possible, invite someone from EEOC (Equal Employment Opportunity Commission) and/or ACLU (American Civil Liberties Union) to speak to the class regarding employment practices and procedures.

4. Locate case studies involving personnel problems and discuss the problems and their solutions with the class. Three periodical sources that contain suggestions for these kinds of situations are:
   a. Administrative Management
   b. The Office
   c. The Secretary

Optional Student Activities

Four activities are provided in the Student Activity Packet. These activities are designed to reinforce the information presented on the slide/tape and to give students an opportunity to demonstrate their understanding of the concepts presented.

The following suggestions for additional activities may be used with students who need further skill refinement in these competencies or in courses where the provided activities are inappropriate. In every instance where these or other teacher-made activities are used, the appropriate performance objectives should be added to those listed.

1. Have the student(s) summarize at least three current articles (not more than a year old) on employment practices as they relate to discriminatory practices in hiring, promotion, termination, etc.

2. If you are working in a group setting, have groups of students role play various personnel management situations. Have each group demonstrate first the incorrect way to handle a specific situation and then the more appropriate way to handle the same situation. Some suggestions for role-playing situations are:

a. Interviewing applicants for a job.

b. Informing an applicant that the job has been offered to someone else.

c. Settling an argument or disagreement between two employees who are in conflict.

d. Holding an evaluation conference with a marginal employee.

e. Terminating an employee.

3. Have individual students work with campus secretaries (or other selected secretaries and/or personnel managers) to update job descriptions that are no longer applicable to the position.

4. Ask members of your advisory committee to interview the students in your class. Then, have the students evaluate the interviewing techniques used.

5. If you are working in a group setting, divide the students into small groups. Have each group develop a specific section of an orientation manual for use by future students in the class. Include such sections as classroom rules and regulations, units of instruction, work measurement and evaluation, and any other topics that would be appropriate. Each year have new students make any appropriate changes in the material contained in the orientation manual.

6. Have the student(s) develop a plan for terminating marginal employees. As a part of this plan, have them develop a timeline and the events that would take place at each stage of the process.

7. Have the student(s) develop a basic letter of reference that could be provided for involuntarily terminated employees. The letter should be designed so that it could be adapted to a variety of situations and could be used as a general guide by managers who are asked to write such letters.

Suggested Evaluation

The following is a checklist that can be used when evaluating the student's successful completion of this packet. This checklist is not intended as a method of grading but merely as a means of determining whether or not the student has mastered the competencies presented in this package.

1. Activity 1

a. The student indicated the title of the position at the beginning of the job description. _____

b. The job description is divided into the three required sections: general qualifications (written in narrative form), specific qualifications, and job duties. _____

c. The required information was included under general qualifications:

(1) highly organized _____

(2) self motivated _____

(3) interested in advancement to higher positions within the company _____

(4) works effectively under pressure _____

d. The required information is included under specific qualifications:

(1) typing (70 wpm) _____

(2) shorthand (100 wpm) _____

(3) operate 10-key adding machine/calculator _____

(4) good written and oral communication skills _____

(5) two years college/postsecondary training _____

(6) one year work experience _____

e. Thirteen duties were listed in the third section

(1) the indicated deletions and additions were made _____

(2) the duties were listed as prioritized on the activity sheet _____

f. The job description occupied no more than one page. _____

g. The job description was attractively formatted. _____

h. The final copy was prepared in typewritten form. _____

i. The job description was completed neatly and accurately. _____

2. Activity 2

a. The advertisement specified that the available position was that of secretary/receptionist. _____

b. The advertisement contained 100 words or less. _____

c. The advertisement included the major qualifications needed by the applicant. _____

d. The advertisement included the required name and address to which responses were to be sent. _____

e. The advertisement was attractively formatted. _____

f. The final copy was prepared in typewritten form. _____

g. The advertisement was completed neatly and accurately. _____

3. Activity 3

a. The student developed five to ten questions to be asked during a job interview. _____

b. The questions listed could not be answered with a simple "yes" or "no" response. _____

c. The student included questions that would elicit information on the applicant's attitudes toward:

(1) the position to be filled _____

(2) working with the public and other employees _____

(3) goal setting _____

d. All of the questions were non-discriminatory. _____

e. The list of questions was prepared in an easy-to-read format. _____

f. The final copy was prepared in typewritten form. _____

g. The list of questions was completed neatly and accurately. _____

4. Activity 4

a. The student composed two evaluation memorandums--one to document a positive evaluation and one to document a negative evaluation. _____

b. The positive evaluation included spaces for:

(1) the employee's name _____

(2) the date on which the evaluation was held _____

(3) the date of the next scheduled evaluation _____

(4) the skills/abilities evaluated _____

(5) the evaluator's signature _____

(6) the employee's signature _____

c. The negative evaluation included spaces for:

(1) the employee's name _____

(2) the date on which the evaluation was held _____

(3) the skills/abilities evaluated _____

(4) an indication of specific deficiencies _____

(5) the action to be taken (including the date of the next evaluation, if appropriate) _____

(6) the evaluator's signature _____

(7) the employee's signature _____

(8) employee comments _____

d. Each memorandum was restricted to no more than one page. _____

e. Each memorandum was attractively formatted. _____

f. The final copy was prepared in typewritten form. _____

g. The memorandums were completed neatly and accurately. _____

5. Completion time for activities

a. Completion time less than suggested time limits. _____

b. Completion time within suggested time limits. _____

c. Completion time exceeded suggested time limits. _____

Keys to Activities

Keys to the four activities have not been provided; student responses will vary on all of the activities. The instructor is advised to use resource sheets A, B, and C as models for evaluating activiites 1, 2, and 3.

RESOURCES AND REFERENCES

Books

Allyn and Bacon
470 Atlantic Avenue
Boston, MA 02210

Office Systems and Careers (1981), Church, Schatz

The Benjamin/Cummings Publishing Company
2727 Sand Hill Road
Menlo Park, CA 94025

Management of Word Processing Operations (1980), Cecil

Wm. C. Brown Company Publishers
Dubuque, IA

Administrative Office Management (1979), Leaming, Motley

Houghton Mifflin
One Beacon Street
Boston, MA 02107

Office Systems and Procedures (1982), Luke, Stiegler

McGraw-Hill Book Company
13955 Manchester Road
Manchester, MO 63011

Dealing With Employment Discrimination (1978), Peres

Essentials of Supervisory Management (1981), Bittel

How to Evaluate People in Business (1980), Dailey, Madsen

How Managers Motivate: The Imperatives of Supervision (1978), Dowling, Sayler

Successful Management of Large Clerical Operations (1981), Stankard

What Every Supervisor Should Know: The Basics of Supervisory Management (1980), Bittel

Prentice-Hall, Inc.
Englewood Cliffs, NJ 07632

How Managers Manage (1980), Kelly

Management of Office Operations (1978), Littlefield, Rachel, Caruth, Holmes

Science Research Associates, Inc.
College Division
1540 Page Mill Road
Palo Alto, CA 94304

Supervisor's Survival Kit (1975), Chapman

South-Western Publishing Co.
5105 Madison Road
Cincinnati, OH 45227

Administrative Office Management (1978), Leeling, Kallaus, Neuner

Human Behavior in Organizations (1978), Williams

Management and Organization (1981), Sisk, Williams

John Wiley & Sons, Inc.
605 Third Avenue
New York, NY 10016

The Art of Problem Solving (1978), Ackoff

Dictionary of Business and Management (1978), Rosenberg

Winthrop Publishers, Inc.
17 Dunster Street
Cambridge, MA 02138

Introduction to Administrative Office Management (1980), Quible

Periodicals

Administrative Management
Geyer-McAllister Publications, Inc.
51 Madison Avenue
New York, NY 10010

"The Delicate Art of Firing" (April, 1981), Hubbartt, pp. 22-23, 42, 44

"How to Keep Morale High (While Cutting Costs)" (March, 1981), Webb, pp. 30-32, 70, 72

Modern Office Procedures
P.O. Box 95795
Cleveland, OH 44101

"Assertiveness Can Make Office Life Easier" (September, 1982), Baron, pp. 56-57

"Casting a Credible Shadow for Employees to Follow" (March, 1981), Bussey, pp. 72-73, 76

"Dealing With Marginal Employees" (May, 1982), Parnell, pp. 110 112, 114

"Keeping the EEOC Away From Your Door" (August, 1981), pp. 60-61, 64

"The Masked Meaning of Nonverbal Messages" (July, 1982), Jackson, pp. 45-46, 50

"Positive Criticism Sessions" (September, 1982), Scott, pp. 56-57

The Office
Office Publications, Inc.
1200 Summer Street
Stamford, CT 06904

"The 80s: High Technology and a Changing Work Force" (January, 1981), Bredeson, pp. 120, 168

"A New Office Concept Geared to People and Productivity" (June, 1982), pp. 19, 22

SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
1	Focus/Synchronize Slide	
2	Title Slide	Managing the Office Employee
3	Stop Slide	Before beginning this slide/tape presentation, stop the recorder and locate the Student Checksheet in your Student Activity Packet. This checksheet provides a convenient means of taking notes on those portions of the presentation that you will need to know in order to confidently complete the activities that accompany this slide/tape package.
4	photo of office interior with office manager as focal point	Although today's office manager must be acutely aware of the office environment and the effect it has on employee satisfaction and productivity, the office manager's responsibilities are not limited to this aspect of the position.
5	photo of office interior from another angle	Often a larger and more important facet of the position is that of employee selection and supervision. Employee selection and supervision can be viewed as a series of overlapping activities, all of which are directly related to the positions available and the individuals chosen to fill those positions.
6	the words Job Analysis composited over an empty desk	The office manager is often responsible for ensuring that each of these activities occurs at the appropriate time and in the most effective way. 1. Job analysis. Each position that is vacated or created should be carefully analyzed to determine if the position is really needed, and if it is, what type of individual should be hired.
7	photograph of an office manager with a question mark composited over it	These two points should be considered both independently and in combination. The office manager needs to ask questions such as: "Is there a definite need for this position? Where does the position 'fit' into the overall organization? What duties will be assigned to the position? How will this reassignment of duties affect the overall operation? What would happen if the position were not filled?"
8	photograph of an applicant with a question mark composited over it	If, after considering the responses to these questions, the position is to be filled, consideration must be given to the type of person to be hired. "What personality type will 'fit in' with the other employees? Are special talents needed by the person responsible for doing the job? What kinds of interpersonal skills are needed in this position?"
9	Need for Position Responsibilities of Position	These questions, of course, are not all that could or even should be asked. However, they provide the bases for determining the need for and the responsibilities assigned to a particular position. Once these determinations have been made, a job description should be developed.

SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
10	Job Description composited over actual job description	2. Job description. The job description, as the name implies, describes the duties and responsibilities associated with a particular position.
11	General	This description can be general in nature, stating broad categories for which the employee has responsibility;
12	Precise	or it may be very precise, listing specific tasks the employee will be expected to perform.
13	the printed job description	The job description is most useful and accurate when it is developed as the direct result of a job analysis--or when it is composed by the person who holds the position. Regardless of the way the description is initiated, it should be detailed enough to enable potential applicants to determine whether or not they have the qualifications abilities, and experience to do the job.
14	close up of one section of the job description	Often a job description is divided into several sections, each of which details an aspect of the job such as qualifications, duties and responsibilities, salary and benefits, and application information. This job description can also serve as a vacancy announcement or as the basis for writing a job advertisement.
15	Vacancy Announcement composited over a vacancy announcement	3. Vacancy announcement. A vacancy announcement or classified advertisement is probably the most commonly used method of informing the public that a job opening exists and that the employer is inviting qualified individuals to apply.
16	Format Varies	Although the format for vacancy announcements will vary from one company to another, some basic rules apply to all job advertisements. Most of these basic rules are the direct result of equal employment legislation that has been enacted.
17	photo of the inside of a courtroom	For example, never specify or even suggest preference for a particular race, color, national origin, or religious affiliation. Many discrimination suits have been brought against employers who, even indirectly, indicated a preference for one group over another.
18	a women's locker room	State that the job will be filled specifically by a man or specifically by a woman only if the duties of the position cannot be performed by both males and females. For example, a position opening for a women's locker room attendant may specify that only female applicants will be considered.

SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
19	List Duties	Instead of stating height, weight, handicapping condition, or other restrictions, list any duties such as driving, lifting, or working in small, enclosed areas that would allow potential applicants to determine whether or not they could do the job.
20	photo of a vacancy announcement	A vacancy announcement that is well written, specific to the position, and detailed enough to automatically screen unqualified applicants will simplify the process of selecting an employee.
21	Employee Selection composited over cartoon of job applicants	4. Employee selection. The process of selecting the right employee for the job is one that must be carefully considered and followed. Many companies must adhere to specific affirmative action guidelines; others rely on strict testing procedures; still others base selection solely on the applicant's personal interview.
22	cartoon from frame 21 with some of the figures removed	If the job analysis and the job description have been carefully completed, the selection process should be simplified. These first two steps will have eliminated many unqualified applicants who might otherwise have applied for the position.
23	several résumés	Few, if any, companies interview all those who apply for a position. Instead, they go through the résumés and/or application forms that have been submitted and select the three to five individuals who seem most qualified. These individuals are invited for a personal interview.
24	interviewer and applicant; focusing on interviewer	The interview is probably the most critical factor in the selection process. The office manager or the interviewer forms first impressions of the applicants based not only on the resumes submitted but also on their personal appearance, their responses to questions, and their enthusiasm.
25	interviewer and applicant; focusing on applicant	At the same time, applicants form immediate and often lasting impressions of both the interviewer and of the company. The questions asked of job applicants can even lead to court actions if the questions and answers are construed as discriminatory or even as likely bases for future discrimination.
26	interviewer	The purpose of the interview is to gather as much pertinent information as possible about the applicant. With this purpose as well as the legal implications in mind, the office manager needs to ask questions, the answers to which will provide information on the abilities, interests, and enthusiasm of the applicant.
27	questions marks	Questions such as "Why do you want to work for our company?" "What are your short-term and long-term goals?" "How would you approach a hostile co-worker?" "What did you like most about your last job?" "What did you like least?" will give valuable insights into the person being interviewed.

SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
28	a cartoon of the interviewer asking these questions	On the other hand, questions such as "How old are you?" "Do you have children?" "Are your parents from the 'old country'?" or "You don't belong to one of those religious groups that expects to have special holidays off, do you?" must be avoided.
29	Know Which Questions to Avoid	Even though the office manager may not plan to use the answers in a discriminatory way, the questions themselves may be seen as discriminatory in nature. Every office manager who conducts employment interviews must be fully aware of questions which may be asked and those that should be avoided.
30	photo of a courtroom	Illegal or potentially discriminatory questions or comments used even to "make conversation" can provide grounds for a later court action.
31	Questions Professional Yes / Personal No	The best rule to follow is to ask only those questions that pertain to the applicant's qualifications for the position being advertised and to avoid probing into the applicant's personal background.
32	list of prepared questions	Finally, in order to provide a basis on which to make a valid comparison of each of the individuals interviewed, ask the same questions of each.
33	cartoon from slide 22 with the word Compare composited over it	When all of the candidates for a position have been interviewed, compare them in terms of the impressions they made, their qualifications for the position, and the answers they gave to the questions asked.
34	cartoon from frame 33 with the applicant selected as the only person left	Once this part of the selection process is finished, the position should be offered to the person who best meets the criteria for the position. However, the selection process is not complete until all applicants have been notified in writing that they either were or were not selected for the job.
35	Employee Orientation composited over the cartoon from frame 34	5. Employee orientation. All new employees should begin their jobs with an orientation period. The orientation can be as short or as long, as simple or as complex as the company wishes to make it.
36	cartooned figure on a tour of the facility	At a minimum, however, the orientation should include a tour of the company, introductions to other employees, and an informative session on the company's philosophy and the employee's role within the company.
37	an orientation handbook	Some firms have developed an orientation handbook for new employees. Such a handbook not only provides general information about the company but also contains specific information on working hours, fringe benefits, holidays, rules and regulations, customer relations, and so forth.

SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
38	Planned and Structured Orientation	The orientation period should be planned and structured in such a way that the new employee is productive immediately upon assuming the responsibilities of the position.
39	Employee Supervision composited over photo of the office manager	6. Employee supervision. Employee supervision requires the office manager to be knowledgeable about motivation, work standards and measurement, and job performance appraisal.
40	Motivation	The office manager must be able to recognize when employees need to be motivated and must provide the motivation necessary to get the employee working to full capacity.
41	a chart depicting rise in morale associated with rise in motivation	Idealistically, every employee will be self-motivated; realistically, however, this is rarely if ever the case for all employees in a firm. Instead, employees both as a group and as individuals experience "highs" and "lows." These periods can almost always be associated with a corresponding rise or fall of morale.
42	Management by Example	Although a decline in morale can be triggered by unknown events or circumstances, the skilled manager can defuse potential problems and eliminate many problems before they occur. Management by example is a proven method for building employee morale and motivation.
43	Management by Example a. Do your job to the best of your ability.	If you find yourself employed as a manager--or even in your role as an employee--you should-- a. Do your job to the best of your ability. Display an air of confidence in your managerial skills.
44	frame 43 with Believe in yourself added as "b"	b. Believe in yourself, in your company, and in the philosophy of your occupational area--and exhibit these beliefs at all times.
45	frame 44 with Demonstrate confidence . . . added as "c"	c. Demonstrate confidence in the employees and show that you are trying to work for them as well as with them.
46	frame 45 with Deal with employees . . . added as "d"	d. Deal with employees in an honest, direct manner. Find out what each employee expects from you as a leader and try to live up to those expectations.
47	frame 46 with Set Goals for Yourself added as "e"	e. In addition, set goals for yourself and let the employees know that you firmly believe in the value of goal setting.

SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
48	Work Standards and Measurement	A second area that the manager must know and be able to communicate involves work standards and measurement. Most employees who are hired obviously possess the skills and abilities to do the job.
49	photo of employee looking confused	Too often, however, managers fail to insure that employees--especially new employees--fully understand the work standards that are expected of them and the ways in which their work will be evaluated.
50	copy of written policy on work standards and measurement	To avoid having to terminate potentially good employees, every person who is hired should be provided with a written policy on work standards and measurement. At the same time, the policy should be explained to insure that there is no misunderstanding.
51	Job Performance Appraisal	If this is done as a matter of routine, job performance appraisal becomes a much easier task. Job performance appraisal is another way of saying evaluation--but with a more positive connotation.
52	office manager commenting on employee's work	New employees should be observed frequently and informally in order to help them adjust to the work environment and to employer expectations. If problems are observed, these should be discussed informally with the emphasis on helping the employee overcome initial difficulties.
53	an extension of frame 52	Any difficulties encountered at this stage of the appraisal process should be approached carefully. Criticism should be constructive rather than destructive; blame should be avoided; helpfulness should be stressed.
54	office manager and employee in office manager's office	Employees should also be formally evaluated at regular, pre-established intervals. These evaluation meetings should be scheduled at times that are conveniert to both the manager and the employee.
55	evaluation instrument	And the employee should be aware--well in advance of the evaluation session--of the points on which the evaluation will be based. An employee should never be surprised to learn that the evaluation involves areas not previously discussed.
56	photo with calendar in background	The best way to avoid this kind of problem is to meet with the employee at least a month in advance of the evaluation session and to outline the evaluation process. At this time, the employee should be made aware, both verbally and in writing, of the points on which the evaluation will be made.

SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
57	photo of employee leaving manager's office looking happy	If the job performance appraisal is positive, the employee should leave the meeting with a feeling of accomplishment and with a clear understanding of the time and purpose of the next evaluation session.
58	photo of employee leaving manager's office looking serious	If the appraisal is negative, every effort should be made to let the employee know what must be done to improve and to meet the employer's expectations. This employee, too, must leave the meeting with a clear understanding of the time and purpose of the next evaluation meeting.
59	photo of employee and manager	If the office manager has been "doing a good job," a negative or less than positive performance appraisal will come as no surprise to the employee. By the time the formal evaluation takes place, the employee will have been counseled and suggestions for improvement will have been made.
60	employee being introduced to another department	Such an employee might be offered opportunities for further training, transfer to another position, or even demotion, as incentives to improve job performance and to avoid termination.
61	an empty desk with the word Termination composited over it	If, after at least one more evaluation has taken place, the employee's job performance has not improved and all reasonable efforts have been made to encourage and help the employee reach an acceptable level of performance, the only solution may be termination.
62	Employee Termination composited over the manager and the employee shaking hands	7. Employee termination. Most managers find the task of firing an employee very difficult. However, the ability to terminate employees without destroying them as individuals or demeaning the employing company is one of the basic management functions.
63	a copy of EEOC and FLR printed regulations	The person charged with this function must be familiar with federal, state, and local equal employment opportunity laws and with federal labor relations laws. Incorrect handling of an employee's termination can affect the company's legal liability.
64	Job Performance Disciplinary Action Economic Conditions	To avoid potential legal problems, the manager should adhere to some basic rules. First, the decision to fire an employee should be based upon substandard job performance, disciplinary action, or economic conditions.
65	Investigation Uniform Enforcement Documentation	Second, the termination process itself--or the process that may end in termination--should be well defined and strictly followed. This involves (1) investigating all the facts, (2) ensuring that the policies are uniformly enforced, and (3) documenting problems and efforts to solve them.

SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
67	a personnel file for the employees	Of these three components, documentation is probably the one that is most often neglected; and this neglect is often the cause of unfair labor practice suits. The easiest way to eliminate these kinds of difficulties is to maintain a personnel file for each employee.
68	documentation being placed in a folder	If an employee has done an outstanding job on a project, documentation of this fact should be placed in the file. When an employee has to be disciplined or when a job performance appraisal is negative, documentation should be placed in the file.
69	examples of documentation	Documentation of all meetings with an employee, both formal and informal, as well as documentation of the measures taken to improve the employee's job performance should also be put in writing and placed in the file.
70	cartoon depicting the paper trail	This process, often referred to as "leaving a paper trail," can provide the necessary justification for terminating a non-productive employee. At the same time, it can protect the company from liability resulting from the firing.
71	If Employee Termination Results . . .	If employee termination is the final result of such a process, there are a few suggestions that will leave both the manager and the employee with intact egos.
72	a. Meet Privately	a. The termination meeting should be held in private and without any interruptions.
73	b. Finalize Details	b. Disposition of current assignments, extensions of fringe benefits, and return of company property should be discussed and finalized.
74	c. Be Concise	c. The termination notice should be delivered in a concise, straightforward manner. Since the decision to fire has already been made, there is little need for long discussions.
75	d. Be Objective	d. The reasons for the termination should be stated objectively--without laying blame, accusing, or demeaning the employee. The person being terminated should retain enough self-confidence and esteem to seek and find other employment.
76	photo from frame 4	Although the office manager is usually charged with a wide variety of responsibilities, the seven general areas referred to in the slide/tape presentation are indicative of the manager's personnel responsibilities.
77	Credits slide	

STUDENT ACTIVITY PACKET

MANAGING THE OFFICE EMPLOYEE

STUDENT ACTIVITY PACKET

Introduction

The office manager functions in a myriad of roles--from equipment specialist to personnel specialist. Although all of the responsibilities with which the office manager is charged are of relatively equal importance, the responsibilities associated with managing personnel are the more complex. These responsibilities are complicated by the human factors that affect every worker--both personally and professionally. Although suggestions can be made for effectively managing employees, every employee is an individual with differing wants and needs; these wants and needs must be considered as management decisions are made.

Performance Objectives

After satisfactorily completing this instructional package, you will be able to:

1. List and describe the seven personnel functions of the office manager.
2. Compose a vacancy announcement.
3. Identify questions to be asked during a job interview.
4. Identify ways to "manage by example."
5. Develop an evaluation documentation form.
6. Identify four actions that should occur during a termination conference.

Materials

*Student checksheet for use with slide/tape presentation
*Resource sheet for activities 1-4
*Resource sheet A - Job Description
*Resource sheet B - "Help Wanted" Advertisements
*Resource sheet C - Evaluation Documentation
Correction materials
Pen or pencil
Typing paper

*These materials are provided as a part of this activity packet.

Directions

This package contains four activities. Each activity is detailed on the resource sheet which contains instructions and/or needed information. To complete each of these activities, follow these steps:

1. Carefully read the overview and the instructions provided on the resource sheet.

2. Assemble any materials you will need to complete the activity.

3. Complete the work called for.

4. Double-check the work you have completed to be sure it is as comprehensive and as error free as possible.

When all activities have been completed, submit them to your instructor for evaluation.

STUDENT CHECKSHEET

(To Be Used With Slide/Tape Presentation)

This sheet is provided as a convenient means of taking notes during the slide/tape presentation. The answers to the questions presented here will be useful when completing the activities that accompany this presentation.

There are seven managerial activities involved in selecting and supervising employees. As each activity is presented, record it on the numbered line; then respond to any questions regarding the activity.

1. _____

To what two considerations is this activity directly tied?

(1) _____

(2) _____

2. _____

Name the two types of job descriptions that are commonly written.

(1) _____

(2) _____

3. _____

a. What four qualifications should never be specified on vacancy announcements?

(1) _____

(2) _____

(3) _____

(4) _____

b. When should an applicant's sex be mentioned on a vacancy announcement?

_____

_____

c. What three guidelines, when adhered to in writing a vacancy announcement, will simplify employee selection?

(1) _____

(2) _____

(3) _____

4. _____

a. Briefly state the purpose of the job interview.

_____

b. Briefly state the general rule to follow in asking questions of the job applicant.

_____

5. _____

Name three elements that should be a part of every employee's orientation.

(1) _____

(2) _____

(3) _____

6. _____

a. Name five guidelines for managing by example.

(1) _____

(2) _____

(3) _____

(4) _____

(5) _____

b. Briefly define or explain job performance appraisal.

_____

_____

c. List three incentives that an employee might be offered to improve job performance and to avoid termination.

(1) _____

(2) _____

(3) _____

7. _____

a. What two kinds of laws or regulations must the manager be aware of when involved in this activity?

(1) _____

(2) _____

b. What two basic rules should be followed in terminating an employee?

(1) _____

(2) _____

c. Briefly explain the phrase "leaving a paper trail."

_____

_____

d. Name four procedures that can make employee termination less traumatic for both the manager and the employee.

(1) _____

(2) _____

(3) _____

(4) _____

RESOURCE SHEET

Activity 1

Overview

Assume that you are employed as the office manager in a temporary employment agency. The secretary/receptionist for the agency has submitted a letter of resignation, effective four weeks from today. In order to replace this employee, you must first update the current job description. Your current secretary/receptionist has already edited that description and has given you that rough edited copy for further work.

Instructions

1. Locate Resource Sheet A - Job Description.
2. Using that edited job description, design a new format and prepare the job description in three sections:
   a. Section I

      General qualifications, in paragraph form, including: highly organized; self motivated; interested in advancement to higher positions within the company; works effectively under pressure.

   b. Section II

      Specific qualifications including: typing (70 wpm); shorthand (100 wpm); operate 10-key adding machine/calculator; good written and oral communication skills; two years college/post-secondary training; one year work experience.

   c. Section III

      Duties taken from the edited job description.
3. Supply an appropriate title.
4. Restrict the job description to no more than one page.
5. Format the job description attractively.
6. Prepare the final copy in typewritten form.

Activity 2

Overview

Once the job description is finalized, you must prepare a concise "help wanted" advertisement to be submitted to the local newspaper.

Instructions

1. Locate Resource Sheet B - "Help Wanted" Advertisements

2. Using the sample help wanted advertisements and the job description completed in Activity 1, prepare an advertisement for the secretary/receptionist position you have open.
3. Restrict the advertisement to no more than 100 words.
4. Instruct applicants to submit a resume and a letter of application to City Temporaries, Box A-1, in care of your local newspaper.
5. Format the advertisement attractively.
6. Prepare the final copy in typewritten form.

Activity 3

Overview

Assume you received thirty responses to the "help wanted" advertisement you developed for a secretary/receptionist. The next step in this process is to select the best applicant to fill the position. You have ranked the applicants in order of preference solely on the basis of their letters of application and resumes. Now you must interview the applicants until you find the one that will best fit your needs.

Instructions

1. Develop a list of five to ten questions that you will ask each of the applicants during the interview.
   a. Avoid questions that elicit a simple "yes" or "no" response.
   b. Include some questions that will elicit information regarding the applicant's attitudes toward the position to be filled, working with the public and other employees, goal setting, and so forth.
2. Prepare the list of questions in an easy-to-read, typewritten form.

Activity 4

Overview

As a part of your job, you are responsible for evaluating the performance of all secretarial/clerical employees and for discussing those evaluations with these employees. In preparation for this phase of your job, design and compose memorandums to be placed in employee files as documentation of both a positive and a negative evaluation.

Instructions

1. Locate Resource Sheet C - "Evaluation Documentation"
2. Using the sample evaluation documentation as a guide, compose two memorandums--one to document a positive evaluation and the other to document a negative evaluation.

a. Positive evaluation

(1) leave a space to insert the employee's name.

(2) leave a space to insert

(a) the date on which the evaluation meeting was held.

(b) the date on which the next evaluation meeting is scheduled.

(3) allow several lines on which to insert the skills/abilities on which the employee was evaluated.

(4) at the bottom, insert spaces for

(a) the evaluator's signature.

(b) the employee's signature.

b. Negative evaluation

(1) leave a space to insert the employee's name.

(2) leave a space to insert the date on which the evaluation meeting was held.

(3) allow several lines on which to insert the skills/abilities on which the employee was evaluated.

(4) provide some means for the evaluator to indicate those skills/abilities in which the employee is deficient.

(5) allow a space in which to insert the action that will be taken as a result of the negative evaluation, including the date of the next evaluation meeting if one is to be scheduled.

(6) at the bottom, insert spaces for

(a) the evaluator's signature.

(b) the employee's signature.

(7) below the signature lines, allow space for any comments the employee wishes to insert in rebuttal of the negative evaluation.

3. Restrict each evaluation documentation to no more than one page.

4. Format each evaluation attractively.

5. Prepare the final copy in typewritten form.

should be arranged in order of priority - see numbers

RESOURCE SHEET A

JOB DESCRIPTION

Secretary

~~Processes and types invoices from purchase orders;~~

~~Maintains inventory books;~~

(5) Processes weekly billing ~~of invoices~~ of clients for services provided.

(6) Maintains ~~invoice files~~ accounts receivable records

(2) Corresponds with ~~customers~~ clients by telephone and mail; gives information about services provided by the agency; contacts ~~customers~~ clients regarding questions on orders; takes orders for temporary personnel (by telephone).

(7) Composes and types routine correspondence.

(8) Types correspondence for manager and staff.

(9) Types from handwritten or typed rough-draft material to camera-ready copy.

(10) Proofs all work for errors and corrects errors.

~~Delivers and picks up mail;~~

(11) Reads and routes incoming mail.

(13) May assist in supervising other clerical employees.

(12) Operates office machines such as 10-key adding machine/calculator, copier, varityper, CRT.

(3) Maintains employee files

(4) Maintains client files

(1) Screens applicants for employment

RESOURCE SHEET B

"HELP WANTED" ADVERTISEMENTS

CREDIT/COLLECTION CLERK

The Dallas Morning News is now accepting applications for an entry level position in the Accounting Department.

Minimum requirements for the position are:

- CRT experience
- Credit/collection experience
- Ability to work with public by telephone

If you are interested and qualified, please call:

CORPORATE SECRETARY

Corporate headquarters of a growing media company is seeking resumes from experienced executive secretaries.

The successful candidate has a minimum of three years executive level secretarial experience, is familiar with word processing systems, and is comfortable meeting with all levels of management. If you possess the necessary skills (typing 70-80wpm & SH 80-100) and are interested in a start-up operation for an exciting industry, send your resume to:

BOX 943
c/o The Dallas Morning News
Dallas, Texas 75265

OFFICE MANAGER

We are currently seeking an Office Manager to manage our Word Processing and Documentation Departments. Minimal requirements include:

- 5 years managing a Word Processing Department
- 3 years managing a Documentation Department
- Currently holding a supervisory position

This individual must have an ability to:

- Install systems to monitor quality and quantity of work, as well as coordinating work flow between the Word Processing and Documentation Departments
- Review equipment needs of central and local users for text and facsimile processing
- Interface with users to ensure responsiveness to their needs
- Anticipate large fluctuations in volume

REPRODUCTION CLERK

We are currently seeking a self-motivated individual with a minimum of 1 year's experience on high volume reproduction machines. An ability to organize, follow instructions, as well as a willingness to cross-train in mail clerk position is a must.

We pay top salaries and have a comprehensive benefits package including dental insurance. Please call or send resume today. All inquiries will be held in strictest confidence.

PSI

PEER SERVICES INCORPORATED
Human Resources Department
Rhonda Sleeper
13465 Midway Road
Dallas, Texas 75234
(214) 851-0700

PRINCIPALS ONLY, PLEASE. AN EQUAL OPPORTUNITY EMPLOYER M/F/H

RESOURCE SHEET C

EVALUATION DOCUMENTATION

To:

From:

Date:

Subject: Documentation of staff evaluation

An evaluation session was held on _____ with _____ to determine competency and/or improvement of the following job skills:

	S	U
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

As a result of this evaluation, the following action is to be taken by the above-named employee:

_____

_____

_____

_____

The next evaluation session for this employee is scheduled for _____.

_____

Evaluator's Signature

I have read and understand the conditions set forth in this evaluation.

_____

Employee's Signature

Employee Comments:

_____

_____

_____

_____

_____